

CM/ECF CIVIL AMENDED ANSWER TO COMPLAINT ATTORNEY TRAINING

Docketing an Amended Answer to a Complaint in a Civil Case

1. Log in to CM/ECF. Locate the **CM/ECF Main Menu Bar** at the top of the screen. Click on the **Civil** option on the **CM/ECF Main Menu Bar** (see Figure 1).

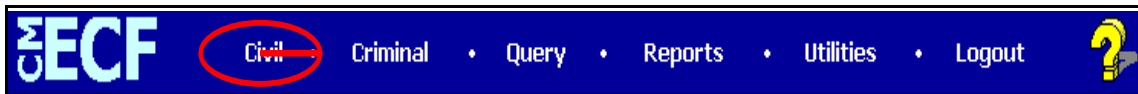


Figure 1 - CM/ECF Main Menu bar

2. The system will display the **Civil Events** screen. Click on **Other Answers** in the Initial Pleadings and Service section (see Figure 2).



Figure 2 - Civil Events screen

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3. The system will display the **Other Answers** selection screen.
 - a. The system will display a list of various types of other answers. Click on the down-arrow or scroll down to select **Amended Answer to Complaints** from the list (the selection is near the top of the list, so it may not be necessary to scroll down). Click on the words **Amended Answer to Complaints**. Once the **Amended Answer to Complaints** event appears highlighted, click the **[Next]** button to continue (see Figure 3).

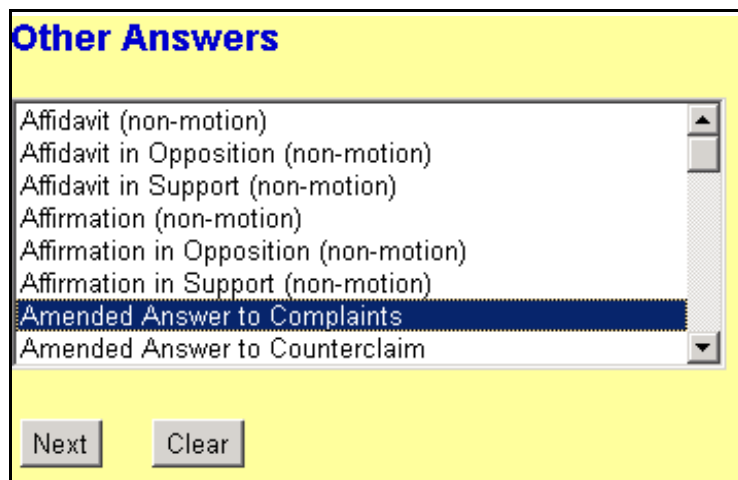


Figure 3 - Other Answers selection screen

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4. The system will display the **Case Number** screen. Enter the case number in the **Case Number** box, using one of the formats displayed. For example: **99-12345**, **1:99-cv-12345**, **1-99-cv-12345**, **99cv12345** or **1:99cv12345**. Click the **[Next]** button to continue (see Figure 4).

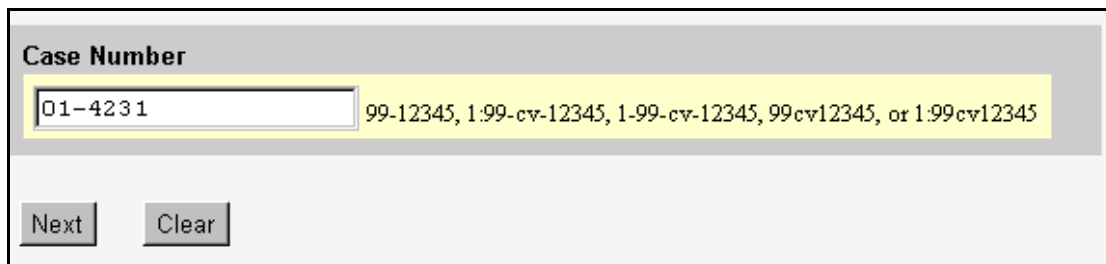
The screenshot shows a web form titled "Case Number". It features a text input field containing "01-4231". To the right of the input field, a list of valid case number formats is displayed: "99-12345, 1:99-cv-12345, 1-99-cv-12345, 99cv12345, or 1:99cv12345". Below the input field and the list, there are two buttons: "Next" and "Clear".

Figure 4 - Case Number screen

- a. If the case number entered is **not** a valid case number, the system will display the following message:

1:yy-cv-nnnnn is not a valid case. Please enter a valid value.

Click the **[Back]** button. The system will return you to the **Case Number** screen. Enter a valid case number, using one of the formats outlined in Step 4.

5. The system will display the **Case Number Verification** screen (see Figure 5). The purpose of the **Case Number Verification** screen is for you to verify the case number entered in Step 4.

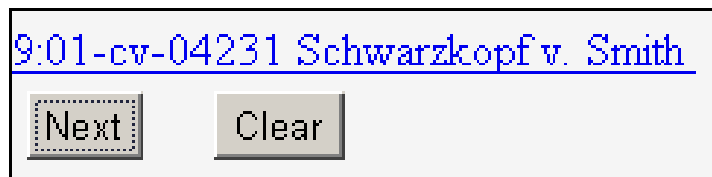
The screenshot shows a web form titled "Case Number Verification". It displays the case number and name in blue text: "9:01-cv-04231 Schwarzkopf v. Smith". Below this text, there are two buttons: "Next" and "Clear".

Figure 5 - Case Number Verification screen

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- a. If this is the correct case, click the **[Next]** button.
 - b. If this is **not** the correct case, you **must** return to the **Case Number** screen in Step 4. To return to the **Case Number** screen, click the **Back** button of your browser until you reach the **Case Number** screen (see Figure 4 in Step 4). Once you reach the **Case Number** screen, repeat Steps 4 and 5.
6. The system will display the following message:
- WARNING!**
Docket the *Rule 7.1 Disclosure Statement* before docketing this response.
- Read this message carefully!** If the party filing the answer is a non-governmental corporate party and has **not** filed a Rule 7.1 Disclosure Statement, then a Rule 7.1 Disclosure Statement **must** be docketed before this answer is docketed.
- a. To docket the Rule 7.1. Disclosure Statement, abort this transaction by clicking the **Civil** option on **CM/ECF Main Menu Bar**. The system will display the **Civil Events** screen. Click on **Other Documents** in the Other Filing section of the **Civil Events** screen and docket the Rule 7.1 Disclosure Statement before docketing this answer.
 - b. If a rule 7.1 Disclosure Statement does **not** need to be docketed at this time, then click the **[Next]** button to continue.
7. The system will display the **Party Selection** screen (see Figure 7).

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The screenshot shows a web-based interface for selecting a party to file an amended answer. At the top, it says "Select the filer." Below that, "Select the Party:" is followed by a list box containing two entries: "Elisabeth Schwarzkopf [Plaintiff]" and "Joe Smith [Defendant]". To the right of the list box is a link that says "Add/Create New Party". At the bottom of the interface are two buttons: "Next" and "Clear".

Figure 7 - Party Selection screen

- a. A list of the parties in the case will be displayed for you to select the party(ies) who is filing the amended answer. To select the party(ies) who is filing the amended answer, click on that party's name to highlight it, then click the **[Next]** button.

NOTE: If the amended answer is being filed by more than one party, click on the first party to highlight it, find the second party in the list, then hold down the Control <Ctrl> key on your keyboard while you click on the second party's name to highlight it. Repeat this process until all the parties who are filing the amended answer are selected.

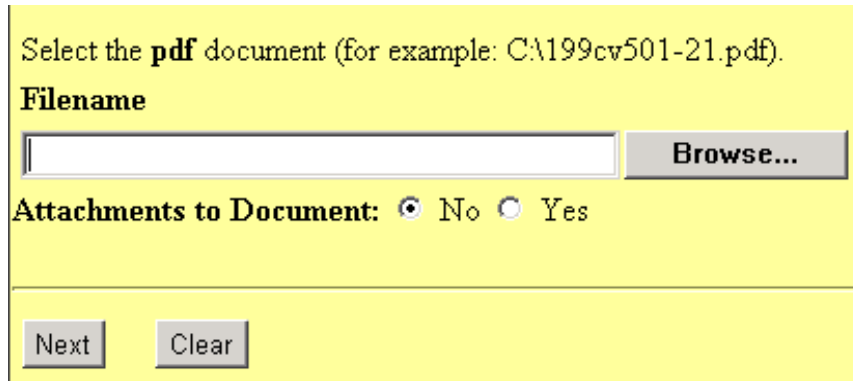
8. The system will display the **pdf document** screen. The **pdf document** screen is used to associate a PDF file/document with the docket entry being docketed (see Figure 8).

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Select the **pdf** document (for example: CA199cv501-21.pdf).

Filename

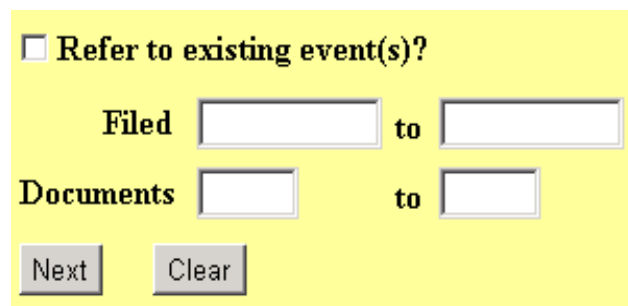
Browse...

Attachments to Document: ☒ No ☐ Yes

Next **Clear**

Figure 8 - PDF Document screen

- a. To associate a PDF Document with this docket entry, and if the PDF Document has any attachments, click the **[Browse...]** button and refer to the **Procedures For Uploading a PDF Document and Attaching an Attachment in CM/ECF**. After attaching the PDF Document, click the **[Next]** button to continue.
9. The system will display the **Refer to existing event(s)?** screen (see Figure 9). The **Refer to existing event(s)?** screen is used to link the document currently being docketed to a previously filed document.



☐ **Refer to existing event(s)?**

Filed **to**

Documents **to**

Next **Clear**

Figure 9 - Refer to existing events screen

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- a. If there is a complaint to link to the amended answer, then click on the check box next to the **Refer to existing event(s)?** prompt. Click the **[Next]** button and proceed to Step 10.

NOTE: You can limit the documents displayed by entering beginning and/or ending date(s) in the **Filed** date range fields, or by entering starting and/or ending number(s) in the **Documents** number range fields. The complaint being answered will then appear in the docket text.

- b. If there is no complaint to link to the amended answer, then leave the check box next to the **Refer to existing event(s)?** prompt blank. Click the **[Next]** button and proceed to Step 11.

10. The system will display the **Complaint Selection** screen (see Figure 10).

Include	Date	#	Docket Text
<input type="checkbox"/>	10/01/2001	<u>1</u>	COMPLAINT against Joe Smith (Filing fee \$ 150.), filed by Elisabeth Schwarzkopf. (Ledford, Kerry) (Entered: 10/22/2001)
<div><input type="button" value="Next"/> <input type="button" value="Clear"/></div>			

Figure 10 - Complaint selection screen

- a. A list of all the complaints in the case for which answers are due will be displayed. To select a complaint to which this answer relates, click in the check box at the far left of the complaint, if it has not already been checked. When you have checked the correct complaint, click the **[Next]** button to continue.

NOTE: If the document number of the complaint is underlined and highlighted in blue, it means that there is a pdf document associated with that complaint. To view the pdf document associated with that complaint, click on the document number nn. The system will then take you to the **PACER Login** screen. Enter your **PACER Login** and **Password**. View the document. To return to the **Complaint Selection** screen, Log out of PACER.

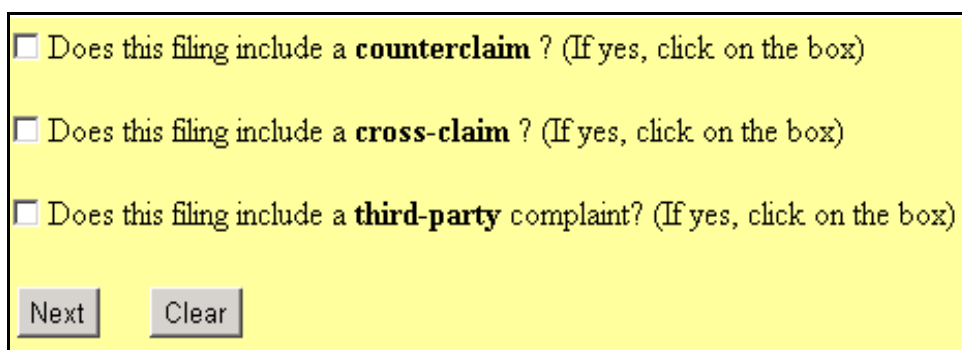
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11. The system will display the **Additional Claim and Complaint** screen. (see Figure 11). The purpose of this screen is for you to indicate whether the amended answer includes a counterclaim, cross-claim, or a third-party complaint.
- If this amended answer contains or includes a **counterclaim**, **cross-claim**, or **third-party complaint**, click the check box next to that type of document. Click the **[Next]** button and proceed to Steps **11c**, **11d**, and/or **11e**, as needed.
 - If this amended answer does **not** contain or include a counterclaim, cross-claim, or third-party complaint, leave the check boxes unchecked, and skip to Step **12**.



☐ Does this filing include a **counterclaim** ? (If yes, click on the box)

☐ Does this filing include a **cross-claim** ? (If yes, click on the box)

☐ Does this filing include a **third-party** complaint? (If yes, click on the box)

Figure 11 - Additional Claim and Complaint screen

- If the **third party complaint** check box was checked, the system will display the **Party Selection** screen again (see Figure 11c). A list of the parties in the case will be displayed for you to select the party(ies) who the third party complaint is **against**. Add the third-party defendant(s) to the case. Click the [Add/Create New Party](#) hyperlink. Please refer to the **U.S.D.C. Southern District of New York's Standardized Procedures for Creating New Party Information in CM/ECF**. After you have added/created new party information return to the **Party Selection** screen. Select the party(ies) who the third party complaint is **against**, click on the party's name to highlight it, then click the **[Next]** button.

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Third Party Complaint

Select from the following list the party(s) **against** whom you are filing this Third-Party Complaint.

Select the Party:	OR	Select a Group:	Add/Create New Party
<div>Schwarzkopf, Elisabeth [Plaintiff] Smith, Joe [Defendant]</div>		<input checked="" type="radio"/> No Group <input type="radio"/> All Defendants <input type="radio"/> All Plaintiffs <input type="radio"/> All Parties	
<div>Next</div>		<div>Clear</div>	

Figure 11c - Party Selection screen for the party the third-party complaint is against

NOTE: If the third-party complaint is **against** more than one party, click on the first party to highlight it, find the second party in the list, then hold down the Control <Ctrl> key on your keyboard while you click on the second party's name to highlight it. Repeat this process until all the parties who the third-party complaint is **against** are selected.

NOTE: DO NOT click on any of the radio buttons listed under the **Select a Group:** list, because the docket text will reflect that the third-party complaint was against "all defendants". The user must select the parties listed under the **Select a Party:** pick list, because the docket text must reflect the actual names of the party(ies) who the third-party complaint is against.

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- d. If the **cross-claim** check box was checked, the system will display the **Party Selection** screen again (see Figure 11d). A list of the parties in the case will be displayed for you to select the party(ies) who the cross-claim is **against**. Add the cross-defendant(s) to the case. Click the [Add/Create New Party](#) hyperlink. Please refer to the **U.S.D.C. Southern District of New York's Standardized Procedures for Creating New Party Information in CM/ECF**. After you have added/created new party information return to the **Party Selection** screen. Select the party(ies) who the cross-claim is **against**, click on the party's name to highlight it, then click the **[Next]** button.

Select from the following list the party(s) **against** whom you are filing this Crossclaim.

Select the Party:	OR	Select a Group:	Add/Create New Party
<div style="border: 1px solid black; padding: 5px; min-height: 100px;">Schwarzkopf, Elisabeth [Plaintiff] Smith, Joe [Defendant]</div>		<input checked="" type="radio"/> No Group <input type="radio"/> All Defendants <input type="radio"/> All Plaintiffs <input type="radio"/> All Parties	
<input type="button" value="Next"/>		<input type="button" value="Clear"/>	

Figure 11d - Party Selection screen for the party the cross-claim is against

NOTE: If the cross-claim is **against** more than one party, click on the first party to highlight it, find the second party in the list, then hold down the Control <Ctrl> key on your keyboard while you click on the second party's name to highlight it. Repeat this process until all the parties who the cross-claim is **against** are selected.

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NOTE: DO NOT click on any of the radio buttons listed under the **Select a Group:** list, because the docket text will reflect that the cross-claim was against “all defendants”. The user must select the parties listed under the **Select a Party:** pick list, because the docket text must reflect the actual names of the party(ies) who the cross-claim is against.

- e. If the **counterclaim** check box was checked, the system will display the **Party Selection** screen again (see Figure 11e). A list of the parties in the case will be displayed for you to select the party(ies) who the counterclaim is **against**. Add the counter defendant(s) to the case. Click the [Add/Create New Party](#) hyperlink. Please refer to the **U.S.D.C. Southern District of New York’s Standardized Procedures for Creating New Party Information in CM/ECF**. After you have added/created new party information return to the **Party Selection** screen. Select the party(ies) who the counterclaim is **against**, click on the party’s name to highlight it, then click the **[Next]** button.

Counter Party Complaint

Select from the following list the party(s) **against** whom you are filing this Counterclaim .

Select the Party: **OR** **Select a Group:**

Schwarzkopf, Elisabeth [Plaintiff]
Smith, Joe [Defendant]

[Add/Create New Party](#)

☒ No Group
☐ All Defendants
☐ All Plaintiffs
☐ All Parties

Next **Clear**

Figure 11e - Party selection screen for the party the counterclaim is against

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NOTE: If the counterclaim is **against** more than one party, click on the first party to highlight it, find the second party in the list, then hold down the Control <Ctrl> key on your keyboard while you click on the second party's name to highlight it. Repeat this process until all the parties who the counterclaim is **against** are selected.

NOTE: DO NOT click on any of the radio buttons listed under the **Select a Group:** list, because the docket text will reflect that the cross-claim was against "all defendants". The user must select the parties listed under the **Select a Party:** pick list, because the docket text must reflect the actual names of the party(ies) who the claim is against.

12. The system will display the following message:

Current Jury Demand value is highlighted on a subsequent screen.

If the highlighted value is correct, do NOT change it.

+ If ONLY PLAINTIFF has demanded jury, value should be p (Plaintiff)

+ If ONLY DEFENDANT has demanded jury, value should be d (Defendant)

+ If BOTH sides have demanded jury, value should be b (Both)

Read this message carefully, then click the **[Next]** button to continue.

13. The system will display the **Update Jury Demand** screen (see Figure 13a).

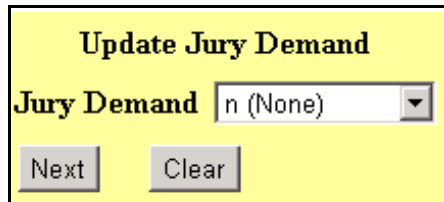


Figure 13a - Update Jury Demand screen

- a. The current jury demand value in the case will automatically be highlighted in the **Jury Demand** pick list. If the highlighted value is correct, do not change it. Click the **[Next]** button and proceed to Step 14.

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- b. If the current jury demand value is **not** correct and need to be changed, click the down-arrow on the **Jury Demand** pick list, and select the correct value; **b (Both)**, **d (Defendant)**, **n (None)**, or **p (Plaintiff)**. (See Figure 13b). Click the **[Next]** button and proceed to Step 14.

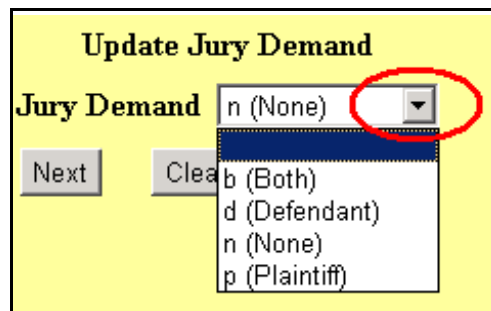


Figure 13b - Update Jury Demand selection

14. The system will display the **Jury Demand** screen (see Figure 14).

If this Answer includes a jury demand, please type JURY DEMAND in CAPS in the box

Figure 14 - Jury Demand screen

- a. If the answer includes a jury demand, enter the words **JURY DEMAND** in ALL CAPITAL LETTERS, in the box next to the prompt. The system will then put the words JURY DEMAND in the docket text. Click the **[Next]** button to continue.
- b. If the answer does not include a jury demand, then leave the box next to the prompt blank. Click the **[Next]** button to continue.

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15. The system will display the **Case Number Verification** screen again (see Figure 15). The purpose of the **Case Number Verification** screen is for you to verify the case number entered in Step 4.

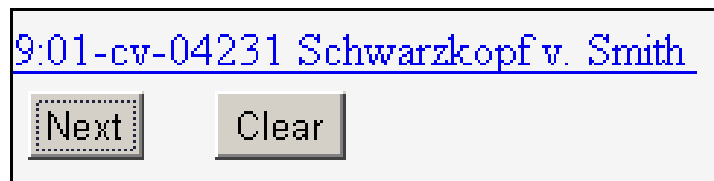


Figure 15 - Case verification screen

- a. If this is the correct case, click the **[Next]** button.
- b. If this is **not** the correct case, you **must** return to the **Case Number** screen in Step 4. To return to the **Case Number** screen, click the **Back** button of your browser until you reach the **Case Number** screen (see Figure 4 in Step 4). Once you reach the **Case Number** screen, repeat Steps 4 through 15.
16. The system will display the **Docket Text: Final Text** screen. The system will display the following message:

Attention!! Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.

NOTE: CHECK THE DOCKET TEXT CAREFULLY HERE. THIS IS THE LAST CHANCE FOR YOU TO GO BACK AND CORRECT ANY ERRORS IN THE TRANSACTION OR TO LEAVE THE TRANSACTION AND START OVER BY CLICKING THE CIVIL OPTION ON THE CM/ECF MAIN MENU BAR.

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When you click the **[Next]** button on this screen, you are submitting this transaction to the CM/ECF database. If there is a mistake in the transaction, you will **not** be able to click the **Back** button of your browser to make any corrections.

If you are completely satisfied with the transaction, click the **[Next]** button to complete the docketing of this transaction.

17. The system will display the **Notice of Electronic Filing** screen (see Figure 17). The **Notice of Electronic Filing** screen is the verification that the filing has been sent electronically to the court's database. It certifies that this is now an official court document.
 - a. To print a copy of this notice, click the browser **Print** icon.
 - b. To save a copy of this receipt, click the **File** option on the browser menu.

NOTE: When you arrive at the **Notice of Electronic Filing** screen, you are finished with the filing/docketing of your transaction. You can select a choice from the **CM/ECF Main Menu Bar** at the top of the screen. For example, you can click on **Civil** or **Criminal** to file/docket another transaction.

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Notice of Electronic Filing

The following transaction was received from Leslie LeFord on 10/29/2001 at 2:42 PM CST

Case Name: Schwarzkopf v. Smith

Case Number: [0-01-04231-RB](#)

Document Number: [19](#)

Docket Text:

MOTION to Continue by Joe Smith. (Ledford, Kerry)

The following document(s) are associated with this transaction:

Document description:Main Document

Original filename:R:/TRAINING/ECF/Docs_PDF/ECF docs/Motion.PDF

Electronic document Stamp:

[STAMP dcstdStamp_ID=981407491 [Date=10/29/2001] [FileNumber=50855-0]
[3f9f4f49836ae59be00306477b777c2dbc6dc6f8b64b9530ad63962089ccd394dc735
12a16b3c4e11ef754e17e46a53ccdc5d5eb14d5f549179dbc3da4ad03a7]]

0-01-04231-RB Notice will be electronically mailed to:

0-01-04231-RB Notice will not be electronically mailed to:

Dale P. Jones
Jones and Associates
129 Main Street
San Antonio, TX 78209

Leslie LeFord
Courthouse Steps
271 Main Plaza
San Antonio, TX 78201

Figure 17 - Notice of Electronic Filing screen